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REPORT OF THE INTERGOVERNMENTAL GROUP OF EXPERTS ON TUNGSTEN ON ITS FIRST SESSION

held at the Palais des Nations, Geneva
from 7 to 11 December 1992

CONTENTS

Chapter		Paragraphs
	Introduction	1 - 6
I.	Examination of statistics and review of the current market situation and outlook (agenda item 3 (a)) . . .	7 - 30
II.	Consideration of industry views on particular aspects of the tungsten industry (agenda item 3 (b))	31 - 34
III.	Consideration of ways, means and measures to improve the functioning and stability of the tungsten market through strengthened international cooperation between Governments and industries of producing and consuming countries (agenda item 4)	35 - 37

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CONTENTS (continued)

Chapter		Paragraphs
IV.	Consideration of project proposals by Governments and industry which could be submitted for possible financing under the Second Account of the Common Fund for Commodities (agenda item 5)	38 - 43
V.	Organizational matters	44 - 49

Annexes

I. Statistical tables

II. Provisional agenda for the second session of the Intergovernmental Group of Experts

III. Attendance

INTRODUCTION

1. The first session of the Intergovernmental Group of Experts on Tungsten, established pursuant to decision 2 (I) adopted by the Standing Committee on Commodities on 23 October 1992, was held at the Palais des Nations, Geneva, from 7 to 11 December 1992. In the course of the session, the Intergovernmental Group of Experts held five plenary meetings.

Opening statement

2. The Deputy to the Secretary-General of UNCTAD and Director of the Commodities Division recalled that the establishment of the Intergovernmental Group of Experts had been part of the follow-up to the outcome of UNCTAD VIII with regard to commodities, which put emphasis on market transparency and cooperation between producing and consuming countries, inter alia, through producer-consumer forums, as essential elements in improving the functioning of commodity markets. There had therefore been consensus within the Standing Committee on Commodities on establishing the Group to succeed the Committee on Tungsten, as then constituted.

3. The Intergovernmental Group of Experts was unique in the tungsten industry, since it was made up of experts from industry, as well as from Governments. The need for such an arrangement was particularly felt at a time when the tungsten market faced great stress from market and structural changes, such as the threat of growing protectionism and substitution, as well as the restructuring in Eastern Europe and the former Soviet Union.

4. The Group's first session was taking place against a background of substantial deterioration in the tungsten market. The continuing recession had deeply affected key tungsten-consuming industries, including the automotive, mining and construction industries, and had led to oversupply, a fall in prices, lower profits and further mine and plant closures.

5. The oversupply had been more serious in the intermediate products market, and the effects of this situation had spilled over into the concentrates market. The prices of ammonium paratungstate had decreased to such a point that they had reached the same level as some concentrate grades, a situation never seen before. Ferro-tungsten had also suffered substantial price falls, and hence it would seem that reducing the supply of ores and concentrates alone while low-priced intermediate materials remained available would not contribute to price stability. However, in the prevailing context of the tungsten market, the measures taken by China to end subsidies to tungsten mines had been a welcome development, although the full effects were yet to be felt in the market.

6. The institutional continuity between the Intergovernmental Group of Experts on Tungsten and the Committee on Tungsten meant that the Group could be expected to assume the status of International Commodity Body (ICB) from its predecessor for the purposes of the Common Fund for Commodities. This would allow the Group to pursue work on the consideration of project proposals for the Common Fund. In both the Committee on Tungsten at its twenty-third session in December 1991 and the Ad Hoc Meeting on Tungsten in July 1992, there had been progress that should be pursued at the current session.

Chapter I

EXAMINATION OF STATISTICS AND REVIEW OF THE CURRENT MARKET SITUATION AND OUTLOOK

(Agenda item 3 (a))

7. For its consideration of this item, the Intergovernmental Group of Experts had before it the following documentation:

"Recent developments and short-term outlook in the tungsten market: report by the UNCTAD secretariat" (TD/B/CN.1/TUNGSTEN/3 and Corr.1);

"Tungsten statistics - UNCTAD Annual Bulletin" (TD/B/C.1/TUNGSTEN/STAT/L.59);

"Tungsten statistics" (UNCTAD/DDM/Misc.49).

8. A representative of the UNCTAD secretariat, introducing documents TD/B/C.1/TUNGSTEN/L.59 and UNCTAD/DDM/Misc.49, noted that the first document contained annual statistical series on production, consumption, trade and stocks for both tungsten concentrates and tungsten products covering the period 1982-1991, while the latter document provided annual statistics since 1989 and quarterly statistics for 1991 and 1992. He recalled that the Group's task was to revise, update and strengthen the data supplied by the secretariat as necessary and to provide the missing data for completion of the statistical tables. (For updated statistics on production, consumption, trade and stocks of ores and concentrates, see annex I)

9. The structure of the tungsten industry had changed tremendously in the last decade or so, with the result that primary consumption and trade in tungsten were now conducted largely in intermediate products. One of the statistics which was sorely missing from the point of view of the industry related to consumption of intermediate products. In the light of the major structural changes affecting the tungsten situation, the Group agreed that the secretariat should introduce the necessary changes in its questionnaire so as to enable it to collect statistics on the consumption of intermediate products.

10. Introducing document TD/B/CN.1/TUNGSTEN/3 and Corr.1, a representative of the UNCTAD secretariat said that the current situation in the tungsten market was characterized by three main factors, namely very weak demand, an abundant availability of material in the market and a low market offtake. Other factors were the structural changes affecting Eastern European countries, including the former USSR, and an increase in scrap recycling and in anti-dumping duties. Consumption of ores and concentrates had fallen by 8.5 per cent in 1991 compared to 1990. It appeared that the fall in the consumption of ores and concentrates worldwide had been due more to economic factors than, as in some previous years, to the inroad made by intermediate products in the market share of concentrates. Estimates of production and consumption of ores and concentrates for 1991 showed a modest market deficit, but some caution was needed in the interpretation of this deficit. There was

a more balanced situation between supply and demand, but tungsten materials were still available in large quantities. The abundant availability of material in the market seemed to have affected the intermediate market more than the concentrate market. The recent decreases had brought APT prices to par with the prices of some concentrate grades, a situation which nobody would have thought possible some years before. The situation in the ferro-tungsten market had not been very different.

11. With regard to the outlook, recent developments showed that the tungsten market had been particularly vulnerable to the economic conditions in the major consuming countries. Much, therefore, would depend on the size and timing of future economic upturns. The latest information indicated that the German economy and the Japanese economy were still slowing down, although the United States economy had shown better growth rates in the preceding two quarters. It appeared that, at least in the short run, the world economic growth rate would remain modest, and the recovery in the tungsten-consuming industries could be even slower. As regards supply, the recent efforts had contributed to streamlining supply and brought about a better balance between supply and demand. The abundant supply of material had been a major factor contributing to the weak market situation. Part of the material had come from stocks, and how much stock material was still available was not exactly known. Developments in the countries of Eastern Europe would remain a factor of uncertainty for the market outlook.

12. The representative of Germany said that, after a long period of economic upswing in the country, also then fuelled by German reunification, economic activities in Germany were declining. For 1992, the Federal Government expected GNP to grow by an annual average of 1.5 per cent in real terms for the entire territory of the Federal Republic, and this growth would be based primarily on construction investment. The economic trends in the two parts of Germany continued to differ considerably. The situation on western Germany's labour market had become more unfavourable in view of the slower economic activity, and a marked rise in unemployment was expected in the course of the year. One reason for the weakened economy was the fact that it was taking longer than expected for the world economy to recover. The dramatic decline of exports to the CIS countries had placed a great burden on the new Länder in particular.

13. The tungsten market was greatly influenced by the overall economic situation. In 1993, German demand for tungsten powder would decrease again, especially because of the economic weakness of the end-users (tool industry, automobile industry, defence industry). He estimated that world demand for primary tungsten material would amount to 30,000 tonnes in 1992, as against 39,300 tonnes in 1991 and 45,000 tonnes in 1990.

14. The representative of China said that, with regard to the current weak price situation, his country had made a substantial contribution towards stabilizing the tungsten market. The Government of China had decided to cease price quotations in 1991, and as from the beginning of 1990, China had adopted effective measures to streamline tungsten mining and close a large number of mines, with the result that tungsten production had decreased. At the same time, China had severely restricted tungsten exports, with exports of tungsten

ores and concentrates in 1990 and 1991 falling by 47 per cent and 80.4 per cent respectively compared with 1989; in 1992, exports for the first three quarters had decreased by 96.5 per cent compared with 1989. Exports of intermediate products had also been substantially reduced recently. The efforts that China was making to stabilize the tungsten market and to improve prices were therefore evident, but the efforts of China alone would not be enough. If an improvement in the functioning and stability of the tungsten market was to be achieved, joint efforts and cooperation between producing and consuming countries were essential.

15. The representative of the United States said that total United States tungsten consumption in 1992 was expected to decrease by 11 per cent to 9,000 tonnes, since slow overall economic growth had caused the reduction of tungsten demand by end-use sectors. Mine production and intermediate tungsten processing capacity utilization rates had been at very low levels in 1991, and employment in the mining and milling and processing sectors had decreased, which might be attributed to the narrow profit margins in conversion of ore and concentrate to intermediate products. United States domestic demand for tungsten concentrate had been met principally through a substantial drawdown in concentrate stocks held by producers and consumers, from 1,800 tonnes at year-end 1991 to an estimated 700 tonnes at year-end 1992.

16. Associated with these decreases in production had been a fundamental change in the pattern of United States trade in tungsten products. A contributing factor had been the 151 per cent anti-dumping duty that the United States had imposed upon imports of tungsten concentrates from China. This had led to imports from China decreasing significantly, while concentrate imports from other sources, mainly Bolivia, Peru and Portugal, had increased. An additional result had been a significant increase in the imports of tungsten products, especially tungsten oxide. Those coming from China had soared by 273 per cent in 1990 and had increased by 9 per cent in 1991 during a period of poor demand, accounting for 98 per cent of United States imports.

17. No disposal of tungsten from the United States Government's National Defense Stockpile would be considered until September 1993. Prior to any disposals from the Stockpile, potential impacts on the market would be analysed, as well as possible disruptions of the usual markets of producers, processors and consumers.

18. In conclusion, prospects for 1993 gave rise to pessimism, and ownership changes in the United States tungsten industry were likely to intensify the trend towards increased imports of downstream tungsten products. In the longer term, if tungsten prices were not to improve, it was unlikely that there would be a resurgence of United States mine or processing output.

19. The representative of France said that the slow-down of the French economy, which had started in the third quarter of 1989, had been aggravated in 1991, when industrial production had decreased by 1 per cent and industrial investments had been reduced by 9 per cent. Consumption of tungsten products in the country in 1991, excluding ferrotungsten, had been 778 tonnes, about the same level as 1990. In 1991, France had imported 683 tonnes of PTA. The production of tungsten powders had decreased markedly between 1990 and 1991,

falling to 373 tonnes. Exports of tungsten oxides, however, had grown from 39.2 tonnes in 1990 to 52.8 tonnes in the following year. In the case of tungsten carbide, exports had also continued to fall, from 297 tonnes in 1989 to 170 tonnes in 1990 and 137.7 tonnes in 1991. The consumption of ferrotungsten had continued decreasing, from 365 tonnes in 1989 to 270 tonnes in 1990 and 192 tonnes in 1991.

20. Finally, in 1992 the situation was still bad, and volumes had fallen due to the fierce price competition. This situation of stagnation had been aggravated by the growth of exports from the former USSR.

21. The representative of Japan recalled that prices of wolframite had decreased steadily throughout the 1980s, and this trend had gone on in 1992 due to the low level of demand caused by the economic slowdown in the world and inventory adjustment by consumers, as well as the low price of ammonium paratungstate on the market.

22. Japanese domestic production of tungsten ores and concentrates had increased by 10 per cent in 1991 to 465 tonnes. Japanese imports of ores and concentrates had decreased sharply by 54 per cent to 1,200 tonnes in the same year, due to the growth in imports of ammonium paratungstate as well as inventory adjustment by consumers.

23. Japanese domestic consumption of ores and concentrates had been decreasing and in 1991 it had fallen by 11.3 per cent to 2,127 tonnes as a result of the growing use of intermediate products as raw materials for tungsten refining. Domestic consumption of primary metal had slowed by 3.8 per cent to 5,088 tonnes in 1991, due to the general economic slowdown and particularly to the reduction in the production of cemented carbide tools used in the automobile and related industries.

24. Although an increase in the recycling of tungsten was rather improbable, research and development was under way with a view to finding an economical method of recycling cemented carbide alloy scrap and developing recycled products which had a variety of uses.

25. The increased requirements for new materials for tools to cope with the development of hard materials which were difficult to cut and drill and for high-speed and high-precision processing tools had favoured the use of substitutes for tungsten, for example cermet, which accounted for approximately the same share (30 per cent) of all indexable inserts as tungsten carbide. This, combined with the existence of special steels of molybdenum and nickel alloys, would have an increasing impact on the supply and demand situation of tungsten in coming years.

26. The representative of the International Tungsten Industry Association (ITIA) said that ITIA estimates for 1991 showed world supply at 38,000 tonnes, as against 45,550 tonnes in 1990, and world demand at 39,350 tonnes, as against 45,150 tonnes in 1990. For the first half of 1992, supply was estimated at 15,600 tonnes and demand at 15,700 tonnes. The fact that the supply/demand table showed a market in balance did not imply a healthy market in terms of equitable prices for producers and consumers. The tungsten market

was very weak at present because supplies were readily available at almost any price, substantial stocks existed to meet demand, annual imports of several thousands tonnes of concentrates by the CIS had ceased, and manufacturing industry was suffering from the recession in the Western world. With further mine closures, including that of the Sangdong mine in the Republic of Korea and the Mittersil mine in Austria, mine production in the market economy countries would be less than 5,000 tonnes in 1993. He indicated that the figures for demand did not include scrap consumption, which was difficult to evaluate given the complexities of the trade and the lack of published data. Previous estimates had invariably added about 25 per cent, but in a recession where every possible cost-saving measure was being implemented, this percentage was likely to increase. Other factors included the imposition of restrictions on imports of concentrate and the value of the cobalt in WC scrap.

27. Some of the key factors which would determine the tungsten market's future might include the timing and extent of the recovery of the economies in the Western world; developments in the CIS and their effect on increased industrial activity in that region; the supply and pricing policies of the major producers; and the production and stock levels of those producers. Furthermore, moves by Governments over the past few years to impose controls on exports and imports of tungsten seemed likely to continue, and future government interventions would be watched with interest. China's policies in terms of supply and pricing under the new corporation controlling exports of tungsten (and antimony) - and the reactions by Western world suppliers to any resulting impact - would play a vital role in this connection. Meanwhile, tungsten remained a unique and valued metal - important strategically and essential to industry - but it could certainly do with a boost in terms of promotion of current usage and discovery of new uses.

28. As regards prices, concentrate prices had climbed steadily in 1991 as announcements had come from China about the suspension of exports of concentrate and possible restrictions on supply of other products, and as the threat emerged from the United States of duties being imposed on imports of concentrate from China. However, the market had quickly resumed its previous downward course in 1992 as it became apparent that supplies were available to meet every demand, stocks had accumulated, and competitive pricing had resulted in a buyer's market. The APT price in Europe was about the same as the price of concentrate, and if APT could be sold without a premium over the concentrate price - a situation long reflected in the FeW price - more Western concentrate and APT producers should be reflecting upon the economic viability of continuing production. Further downstream, the effect of cheap raw material was reflected in a highly competitive powder market, with prices falling. As the decline in the trade of concentrate continued and its price became less and less relevant, there had again been proposals for the Metal Bulletin quotation to be based entirely on APT prices.

29. The representative of Portugal recalled that his country was the only producer of tungsten concentrates in the European Community, and it had just one operating mine; all the other seven mines had been closed, including three which had been kept on a care and maintenance basis. After having fallen

continuously starting from 1986, concentrate production had stabilized at 1,400 tonnes (tungsten content), but in 1991 it had fallen again to 972 tonnes. Production in 1992 was expected to remain at the same level as in 1991. He concluded by saying that any form of lasting stability in the tungsten market would depend upon the joint efforts of producers and consumers, and in this sense the Group's task was not only to promote market transparency by studying statistics but also to discuss ways and means of enhancing the functioning of the market. Special efforts should be made to encourage the participation of industry advisers in the work of the Group.

30. The representative of Sweden said that in his country the main consumers of tungsten were being affected by the recession. Domestic steel demand had fallen dramatically, with apparent consumption dropping by about 20 per cent. For 1992 consumption was expected to decrease by about 5 per cent, and for 1993 steel demand was forecast to stay at about the 1992 level. Total national consumption of tungsten products by end users had been 2,193 tonnes (tungsten content) in 1989, compared to 2,081 tonnes in 1990 and 1,429 tonnes in 1991. In 1992 it would be even lower, though a modest recovery was possible for 1993.

Chapter II

CONSIDERATION OF INDUSTRY VIEWS ON PARTICULAR ASPECTS OF THE TUNGSTEN INDUSTRY

(Agenda item 3 (b))

31. Under this item, Mr. Paul H. Missen, Anglo American Corporation, gave a presentation on "Tungsten: supply, demand and price". He pointed out that real concentrate prices had fallen consistently from the late 1970s to reach, in 1990, their lowest point since the early 1920s. Ferro-tungsten and, more recently, APT prices had fallen similarly. This could be explained by the fact that, since the late 1970s, the years of over-supply in the tungsten concentrate markets of the market-economy countries (MECs) had considerably outnumbered those of over-demand, and this had caused a considerable build-up of stocks. Weak concentrate prices had forced a severe curtailment of MEC mine production, which had fallen by an annual average of 11 per cent since 1980 and should reach 6,000 tonnes in 1992. As a consequence, five countries alone had produced three-quarters of MEC mine output in 1991.

32. Although MEC demand for concentrates had declined by 3.5 per cent per year since the early 1980s, total aggregate tungsten consumption (which included intermediate products) in those countries had increased by a yearly rate of 2.5 per cent. This rate had been on average 1.5 per cent less than the annual increase in MEC industrial production, highlighting the intensity decline of tungsten. The same process had been observed with all mature metals. In the case of tungsten it had been caused by the wide range of forces acting in favour of economization, substitution and obsolescence. Consumption had decreased in 1990 and 1991 and was likely to follow the same path in 1992, reflecting the fact that several important tungsten end-uses were tied to the capital-goods cycle, at a time when investment relative to the consumption component of GDP had declined.

33. He postulated two long-term illustrative scenarios in order to highlight driving forces and key uncertainties. The "worst case" scenario combined a consumption growth rate of 1.5 per cent from 1991 to 2002 with annual imports from China and perhaps the former Soviet Union totalling 20,000 tonnes, resulting in required MEC mine production falling further in 1993 and then recovering only gradually to around 8,000 tonnes by 2002. The price would dip further in 1993 and increase only gradually thereafter.

34. In the "best case" scenario, more robust consumption growth of 2.5 per cent was combined with exports from China and the former Soviet Union of around 15,000-16,000 tonnes, with required MEC mine supply increasing rapidly over the period, to reach 18,000 tonnes by 2002. Even in this case, the trend in annual average prices would only be gradually upwards, and by the year 2002 there might be enough idle capacity to satisfy mine requirements at less than US$ 100/mtu. He concluded by saying that the uncertainties were such, especially on the supply side, that both scenarios were quite plausible.

Chapter III

CONSIDERATION OF WAYS, MEANS AND MEASURES TO IMPROVE THE FUNCTIONING AND STABILITY OF THE TUNGSTEN MARKET THROUGH STRENGTHENED INTERNATIONAL COOPERATION BETWEEN GOVERNMENTS AND INDUSTRIES OF PRODUCING AND CONSUMING COUNTRIES

(Agenda item 4)

35. Some members of the Intergovernmental Group of Experts said that the Group should not confine itself to studying statistics and identifying issues, but should consider ways and means of improving cooperation between producers and consumers with a view to finding solutions to the problems identified, in accordance with paragraph 191 of the Cartagena Commitment (TD/364) adopted by UNCTAD at its eighth session. Most other members present stated that the Group was not an appropriate forum for taking decisions that would suggest Government interventions in the market, and the Intergovernmental Group of Experts could contribute to improving the functioning and stability of the tungsten market by activities aimed at enhancing market transparency through better collection and distribution of statistical data and at examining long-term prospects for supply and demand.

36. The Group agreed that its future activities should include enhancing market transparency, improving the collection and dissemination of statistics, the review of the current market situation and short-term outlook, as well as the medium to long-term perspective, and the consideration of projects submitted to it for sponsoring with the Common Fund for Commodities. The Group provided a forum for an exchange of views aimed at clarifying issues and facilitating informed decisions in capitals. Particular efforts should be made to encourage the participation of industry advisers in the work of the Group.

Closing statement

37. At the closing plenary, on 11 December 1992, the representative of China said that the proceedings of the Intergovernmental Group's first session had demonstrated once again that, to solve certain problems that existed in the field of tungsten, cooperation between producers and consumers was vital.

Chapter IV

CONSIDERATION OF PROJECT PROPOSALS BY GOVERNMENTS AND INDUSTRY WHICH COULD BE SUBMITTED FOR POSSIBLE FINANCING UNDER THE SECOND ACCOUNT OF THE COMMON FUND FOR COMMODITIES

(Agenda item 5)

38. For its consideration of this item, the Intergovernmental Group of Experts had before it the following documentation:

"Project proposals submitted to the UNCTAD secretariat by the People's Republic of China: note by the UNCTAD secretariat" (TD/B/CN.1/TUNGSTEN/4).

"Health and environmental effects testing of tungsten materials" (TD/B/CN.1/TUNGSTEN/AC.3).

"Report of the Ad Hoc Meeting on Tungsten, held at the Palais des Nations, Geneva, from 2 to 3 July 1992" (TD/B/CN.1/TUNGSTEN/2).

39. Document TD/B/C.1/TUNGSTEN/4 was introduced by the representative of China, who indicated that the document contained the revised text of the three project proposals submitted by his country at the twenty-third session of the Committee on Tungsten. The revised text took into account the comments made in the Committee on Tungsten and at the Ad Hoc Meeting on Tungsten in July 1992 in respect of the economic, technical and budgetary aspects of the three project proposals.

40. During the discussion on document TD/B/C.1/TUNGSTEN/4, further comments and clarifications were made on a number of issues, including the area of application of the new products to be developed, the size of their domestic and export markets, the potential beneficiaries of the project proposals and the conformity of the project proposals with the criteria established by the Common Fund for the submission of project proposals for financing under its Second Account.

41. The Group decided to request the Secretary-General of UNCTAD to submit, on its behalf, to the Common Fund for Commodities project B, entitled "Development of the rare earth doped cemented carbide and its mechanism research", in document TD/B/CN.1/TUNGSTEN/4, which the Group approved from the technical and market point of view and recommended for financing through the Second Account of the Common Fund, provided that no written statement to the contrary, with the reasons for the objection, had been received from any member of the Group by the Secretary-General of UNCTAD by 11 February 1993. It was understood that any other written communication relating to this project received by the Secretary-General of UNCTAD by that date should be communicated to the Common Fund along with the project itself.

42. The project proposal entitled "Health and environmental effects testing of tungsten materials" (TD/B/CN.1/TUNGSTEN/AC.3), submitted by the International Tungsten Industry Association and initially presented at the Ad Hoc Meeting on Tungsten in July 1992, was further considered by the Intergovernmental Group of Experts. Clarification was sought on a number of points, including the range of tungsten products to be tested for toxicity and the significance of these tests in practical terms, since the tests proposed were to be conducted on animals and in a laboratory. The project would be amended to take these points into account.

43. The Group decided to request the Secretary-General of UNCTAD to submit, on its behalf, to the Common Fund for commodities, the project entitled "Health and environmental effects testing of tungsten materials", in document TD/B/CN.1/TUNGSTEN/AC.3 and Add.1, which the Group approved from the technical and market point of view and recommended for financing through the Second Account of the Common Fund, provided that no written statement to the contrary, with the reasons for the objection, had been received from any member of the Group by the Secretary-General of UNCTAD by 11 February 1993. It was understood that any other written communication related to this project rece ived by the Secretary-General of UNCTAD by that date should be communicated to the Common Fund along with the project itself.

Chapter V

ORGANIZATIONAL MATTERS

A. Opening of the session

44. The first session of the Intergovernmental Group of Experts on Tungsten was opened on 7 December 1992 by the Deputy to the Secretary-General of UNCTAD, who made an opening statement (see paras. 2-6 above).

B. Election of officers (agenda item 1)

45. At its 1st meeting, on 7 December 1992, the Intergovernmental Group of Experts elected Mr. E. Orbegoso (Spain) as its Chairman and Mr. A. Ouchi (Japan) as its Vice-Chairman-cum-Rapporteur.

C. Adoption of the agenda (agenda item 2)

46. At the same meeting, the Intergovernmental Group of Experts adopted its provisional agenda (TD/B/CN.1/TUNGSTEN/1), as follows:

1. Election of officers

2. Adoption of the agenda

3. (a) Examination of statistics and review of the current market situation and outlook

   (b) Consideration of industry views on particular aspects of the tungsten industry

4. Consideration of ways, means and measures to improve the functioning and stability of the tungsten market through strengthened international cooperation between Governments and industries of producing and consuming countries

5. Consideration of project proposals by Governments and industry which could be submitted for possible financing under the Second Account of the Common Fund for Commodities

6. Provisional agenda for the second session of the Group

7. Other business

8. Adoption of the report of the Intergovernmental Group to the Standing Committee on Commodities

D. Provisional agenda for the second session of the Group (agenda item 6)

47. At its 5th (closing) plenary meeting, on 11 December 1992, the Intergovernmental Group of Experts adopted the draft provisional agenda for its second session (TD/B/CN.1/TUNGSTEN/L.2) (For the provisional agenda, see annex II).

48. In connection with the adoption of the provisional agenda for the second session of the intergovernmental group, it was agreed that the second session should be of three days' duration and should take place preferably in conjunction with a session of the Standing Committee on Commodities or the Intergovernmental Group of Experts on Iron Ore.

E. Adoption of the report of the Intergovernmental Group to the Standing Committee on Commodities (agenda item 8)

49. At its 5th (closing) plenary meeting, on 11 December 1992, the Intergovernmental Group of Experts adopted its draft report (TD/B/CN.1/TUNGSTEN/L.1) and authorized the Rapporteur to complete the report to reflect the proceedings of the closing plenary.

Table 1

Data summary: the current situation with respect to tungsten ores and concentrates

(Metric tons, Tungsten content)

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992a/
Production	40350	48099	46741	44767	40492	49570	51122	44417	37830	32649
Consumption	39884	47422	44968	42456	43382	47220	50937	45199	38618	34155
Imports	20955	26931	25136	20899	19889	23594	23575	17704	14606	7460
Exports	25647	26121	26592	23392	22457	23360	24906	16524	12017	6605

Source: Based on Tungsten Statistics.

a/ Estimates, partly based on data provided by delegations.

Table 2

PRODUCTION OF TUNGSTEN IN ORES AND CONCENTRATES
(Metric tons, Tungsten content)

Region or country	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
WORLD	**40350**	**48099**	**46741**	**44767**	**40492**	**49570**	**51122**	**44417**	**37830**	**32649**
DEVELOPED MARKET ECONOMY COUNTRIES	**8117**	**11970**	**11390**	**9030**	**4323**	**5177**	**5106**	**4727**	**2986**	**3072**
North America	*1308*	*4918*	*4001*	*2053*	*34*	*350*	*400*	*450*	*100*	*100*
Canada	328	3715	3005	1273	-	-	-	-	-	-
United States	980	1203	996	780	34	350E	400E	450E	100E	100E
EEC	*2498*	*2820*	*2963*	*3077*	*1289*	*1461*	*1484*	*1431*	*972*	*972*
France	793	742	735	937	-	-	-	-	-	
Portugal	1182	1509	1766	1657	1209	1381	1376	1404	972	972E
Spain	521	569	462	483	80	80	58	27	-	-
United Kingdom	-	-	-	-	-	-	30	-	-	-
Other Europe	*1773*	*2017*	*1883*	*1744*	*1584*	*1834*	*1580*	*1500*	*1400*	*1500*
Austria	1408	1632	1481	1387	1250E	1507	1500E	1500E	1400E	1500E
Sweden	365	385	402	357	334	327	80	-	-	-
Others	*2540*	*2215*	*2543*	*2156*	*1416*	*1532*	*1682*	*1346*	*514*	*500*
Australia	2061	1733	1970	1572	1152	1261	1371	1087	235	200E
Japan	474	477	568	579	259	266	286	254	279	300E
New Zealand	5	5	5E	5E	5E	5E	5E	5E	-	-
DEVELOPING COUNTRIES AND TERRITORIES	**8453**	**9079**	**8301**	**6687**	**5619**	**5543**	**5166**	**3840**	**3994**	**3227**
Africa	*308*	*370*	*199*	*46*	*37*	*29*	*130*	*176*	*220*	*170E*
Rwanda	231	291	167	13	11	3	100E	156	200E	150E
Uganda	18E	20E	4E	4E	4E	5E	5E	-	-	-
Zaire	44	30	18	27	21	20E	20E	20E	20E	20E
Zimbabwe	15	29	10	2	1	1	5E	-	-	-
Latin America	*4407*	*3962*	*3980*	*2953*	*1963*	*2427*	*2252*	*1712*	*2427*	*347*
Argentina	41	37	17	20	14	13	20	6	10E	10E
Bolivia	2490	1893	1643	1160	624	924	1118	818	1000E	1000E
Brazil	1026	1101	1297	875	672	739	679	316	223	200E
Guatemala	-	-	9	-	-	-	-	-	-	-
Mexico	147	145	282	294	213	206	170	183	194	147E
Peru	703	786	732	604	440	545	265	389	1000E	1000E
Asia	*3738*	*4747*	*4122*	*3688*	*3619*	*3087*	*2784*	*1952*	*1347*	*700*
India	16	29	28	23	26	19	12	12	20E	20E
Malaysia	31	25	20	2	20E	-	-	-	-	-
Myanmar	930	1096	945	715	493	450	464	300E	300E	300E
Republic of Korea	2101	2702	2370	2240	2180	1825	1560	1250E	700	250E
Thailand	563	742	585	512	702	651	648	290	227	130E
Turkey	97	153	174	196	198	142	100E	100E	100E	-
COUNTRIES OF EASTERN EUROPE	**9780**	**10050**	**10050**	**9050**	**9050**	**7050**	**7050**	**7050**	**7050**	**7050E**
Czechoslovakia	80E	50E	50E	50E	50E	50E	50E	50E	50E	50E
Former USSR	9700E	10000E	10000E	9000E	9000E	7000E	7000E	7000E	7000E	7000E
SOCIALIST COUNTRIES OF ASIA	**14000**	**17000**	**17000**	**20000**	**21500**	**31800**	**33800**	**28800**	**23800**	**19300**
China	12000E	15000E	15000E	18000E	20000E	30000E	32000E	27000E	22000E	18000E
Dem. People's Rep. of Korea	1000E	1000E	1000E	800E	500E	500E	500E	500E	500E	500E
Mongolia	1000E	1000E	1000E	1000E	1000E	1000E	1000E	1000E	1000E	500E
Viet Nam	..	..	..	..	..	300E	300E	300E	300E	300E

Sources: Replies to questionnaires. Annual data estimated by UNCTAD secretariat for: Austria, China, Czechoslovakia, Democratic People's Republic of Korea, Malaysia, Mongolia, Myanmar, New Zealand, former USSR, Uganda and Viet Nam.

Note: Austria: Data are not published to avoid disclosing company proprietary information: UNCTAD estimate.

Table 3

CONSUMPTION OF TUNGSTEN IN ORES AND CONCENTRATES
(Metric tons, Tungsten content)

Region or country	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
WORLD	**39884**	**47422**	**44968**	**42456**	**43382**	**47220**	**50937**	**45199**	**38618**	**34155**
DEVELOPED MARKET ECONOMY COUNTRIES	**13711**	**20149**	**17112**	**13636**	**14243**	**15900**	**15231**	**11302**	**10351**	**8575**
North America	*5181*	*8577*	*6838*	*4810*	*6271*	*8218*	*8025*	*6168*	*6655*	*5500E*
Canada	..	..	-	6	765	386	300	290	255	-
United States	5181	8577	6838	4804	5506	7832	7725	5878	6400E	5500E
EEC	*3738*	*6018*	*4472*	*3477*	*3008*	*2958*	*3308*	*1329*	*370*	0
Belgium-Luxembourg	10	142	341	30	50E	50E	2	-	-	-
France	520	815	808	677	269	34	-	-	-	-
Germany	2030	3934	2073	1720	1863	2144	2576	749	350E	150E
Germany (former D.R.)	300E	300E	300E	300E	300E	300E	300E	300E		-
Italy	27	78	92	80	86	20E	10E	10E	-	-
Netherlands	300E	300E	400E	350E	300E	330E	350E	200E	-	-
Portugal	174	159	158	40	20	-	..	-	-	-
Spain	107	40E	60E	50E	20E	30E	20E	20E	-	-
United Kingdom	270E	250E	240E	230E	100E	50E	50E	50E	20E	50E
Other Europe	*2403*	*2861*	*2820*	*2855*	*2567*	*2447*	*2152*	*2196*	*1834*	*1770*
Austria	1629	2096	2000E	2000E	2000E	2100E	1800E	1800E	1600E	1500E
Sweden	774	765	820	855	567	324	320	380	202	240E
Switzerland	-	-	-	-	-	23	32	16	32	30E
Others	*2389*	*2893*	*2982*	*2494*	*2397*	*2277*	*1746*	*1609*	*1492*	*1105E*
Australia	140	136	111	94	70E	50E	50E	50E	50E	50E
Japan	1994	2302	2616	2145	2119	1980	1538	1440	1276	900E
New Zealand	5E	5E	5E	5E	5E	5E	5E	5E	5E	5E
South Africa	250E	250E	250E	250E	203	242	153	114	161	150E
DEVELOPING COUNTRIES AND TERRITORIES	**2300**	**2879**	**3453**	**2956**	**3195**	**2596**	**2956**	**2547**	**2067**	**2380**
Latin America	*495*	*652*	*1155*	*739*	*995*	*829*	*756*	*397*	*167*	*180*
Argentina	23	37	28	25	64	67E	50	29	30E	30E
Brazil	450	538	1048	672	867	753	701	363	137	150E
Mexico	22	77	79	42	64	9	5E	5E	-	-
Asia	*1805*	*2227*	*2298*	*2217*	*2200*	*1767*	*2200*	*2150*	*1900*	*2200*
India	250	157	250E	230	250E	187	200E	200E	200E	200E
Republic of Korea	1555	2070	2048	1987	1950	1580	2000	1950	1700	2000E
COUNTRIES OF EASTERN EUROPE	**18873**	**18394**	**17403**	**18064**	**17444**	**15224**	**14250**	**12850**	**7700**	**7700E**
Bulgaria	100E	100E	100E	100E	100E	100E	50E	50E	-	-
Czechoslovakia	1300E	1300E	1300E	1300E	1200E	1200E	1700E	600E	500E	500E
Former USSR	16000E	16000E	15000E	15000E	15000E	13000E	12000E	12000E	7000E	7000E
Hungary	400E	400E	400E	400E	400E	500E	500E	200E	200E	200E
Poland	1073	594	603	1264	744	424	-	-	-	-
SOCIALIST COUNTRIES OF ASIA	**5000**	**6000**	**7000**	**7800**	**8500**	**13500**	**18500**	**18500**	**18500**	**15500**
China	4000E	5000E	6000E	7000E	8000E	13000E	18000E	18000E	18000E	15000E
Dem. People's Rep. of Korea	1000E	1000E	1000E	800E	500E	500E	500E	500E	500E	500E

Sources: Replies to questionnaires. Annual data estimated by UNCTAD secretariat for: Australia, Austria, Belgium-Luxembourg, Bulgaria, China, Czechoslovakia, Germany (former German Democratic Republic), Hungary, India, Democratic People's Republic of Korea, Netherlands, New Zealand, South Africa, United Kingdom and former USSR

Note: Apparent consumption for: Germany (former Federal Republic of Germany), Italy, Spain and Poland.

United States 1990: refers to 10 months of data. Two months withheld to avoid disclosing compagny proprietary information.

Table 4

IMPORTS OF TUNGSTEN IN ORES AND CONCENTRATES
(Metric tons, Tungsten content)

Region or country	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
WORLD	**20955**	**26931**	**25136**	**20899**	**19889**	**23584**	**23575**	**17704**	**14606**	**7460**
DEVELOPED MARKET ECONOMY COUNTRIES	**10270**	**16120**	**13053**	**8937**	**9794**	**13997**	**13489**	**10046**	**9596**	**4200**
North America	*2873*	*5814*	*4755*	*2532*	*4436*	*8045*	*7896*	*6420*	*7837*	*2800*
Canada	12	7	9	10	1	-	-	-	-	-
United States	2861	5807	4746	2522	4435	8045	7896	6420	7837	2800E
EEC	*3258*	*5898*	*3706*	*2725*	*2839*	*2932*	*3228*	*1418*	*399*	*270*
Belgium-Luxembourg	-	141	341	30	72	50E	2	-	-	-
France	157	400	201	103	22	-	2	4	19	100E
Germany	2071	3934	2074	1720	1863	2220	2594	752	308	170
Germany (former D.R.)	300E	300E	300E	300E	300E	300E	300E	300E	-	-
Italy	27	78	92	80	86	21	15	7	-	-
Netherlands	315	547	353	172	307	330	271	267	1	-
Spain	-	-	-	-	-	-	-	43	45	-
United Kingdom	388	498	345	320	189	11	44	45	26	-
Other Europe	*2037*	*2549*	*2678*	*2405*	*1211*	*1106*	*823*	*541*	*479*	*380*
Austria	1669	2110	2057	1675	1066	674	435	356	226	100E
Sweden	368	439	621	730	145	409	356	169	221	250E
Switzerland	-	-	-	-	-	23	32	16	32	30E
Others	*2102*	*1859*	*1914*	*1275*	*1308*	*1914*	*1542*	*1667*	*881*	*750*
Australia	9	-	-	2E	-	1E	-	-	-	-
Japan	1832	1656	1635	1008	1105	1671	1389	1553	720	600E
South Africa	261	203	279	265	203	242	153	114	161	150E
DEVELOPING COUNTRIES AND TERRITORIES	**862**	**1467**	**3230**	**2948**	**1651**	**1373**	**2886**	**1808**	**2360**	**2710**
Latin America		*24*	*12*	*5*	*123*	*72*	*52*	*70*	*9*	*10*
Argentina	-	-	11	5	50	54	30	23	9	10E
Brazil	-	24	-	-	72	17	22	47	-	-
Venezuela	..	-	1	-	1	1	-	-	-	-
Asia	*862*	*1443*	*3216*	*2943*	*1528*	*1301*	*2834*	*1738*	*2351*	*2700*
Hong Kong	-	26	2109	2013	709	731	1740	1047	266	400E
India	224	149	220	250E	194	177	241	184	200E	200E
Indonesia	-	-	-	15E	-	-	1	-	-	-
Malaysia	15E	15E	11	29	20E	-	1	3	..	-
Republic of Korea	-	-	-	-	-	-	500	1	1200	1800E
Singapore	623	1253	876	636	605	393	351	503	685	300E
Others			*2*							
Yugoslavia	-	-	2	-	-	-	-	-	-	-
COUNTRIES OF EASTERN EUROPE	**9823**	**9344**	**8853**	**9014**	**8444**	**8224**	**7200**	**5850**	**2650**	**550**
Bulgaria	100E	100E	100E	100E	100E	100E	100E	50E	50E	50E
Czechoslovakia	1250E	1250E	1250E	1250E	1200E	1200E	1700E	600E	400E	300E
Former USSR	7000E	7000E	6500E	6000E	6000E	6000E	5000E	5000E	2000E	-
Hungary	400E	400E	400E	400E	400E	500E	400E	200E	200E	200E
Poland	1073	594	603	1264	744	424	-	-	-	-

Sources: UNCTAD, replies to questionnaires supplemented by published national statistics for: Italy, Hong Kong, Singapore and Switzerland.

Notes: Figures estimated by UNCTAD secretariat for: Bulgaria, Czechoslovakia, Germany (former German Democratic Republic), Hungary, India, Indonesia, Malaysia, South Africa, former USSR and Venezuela.

Table 5

EXPORTS OF TUNGSTEN IN ORES AND CONCENTRATES
(Metric tons, Tungsten content)

Region or country	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
WORLD	**25647**	**26121**	**26592**	**23392**	**22457**	**23360**	**24906**	**16524**	**12017**	**6805**
DEVELOPED MARKET ECONOMY COUNTRIES	**5265**	**8264**	**7893**	**4833**	**3137**	**3758**	**2978**	**2707**	**2696**	**1800**
North America	*301*	*3529*	*2923*	*1434*	*2*	*173*	*203*	*144*	*21*	*30*
Canada	300	3400E	2800E	1400E	-	1	-	5	-	-
United States	1	129	123	34	2	172	203	139	21E	30E
EEC	*2379*	*2689*	*3062*	*1730*	*1829*	*1967*	*1328*	*1476*	*1831*	*1520*
Belgium-Luxembourg	-	-	-	-	-	-	1	-	10E	100E
France	478	297	275	202	138	56	-	4	18	-
Germany	41	-	1	-	-	76	18	3	20	20E
Italy	-	-	3	3	-	6	9	6	-	-
Netherlands	373	268	693	115	13	98	54	127	-	-
Portugal	978	1472	1548	872	1231	1431	1159	1319	1712	1400E
Spain	390	489	433	446	115	51	74	-	71	-
United Kingdom	119	163	109	92	332	249	13	17	-	-
Other Europe	*446*	*284*	*104*	*275*	*175*	*408*	*323*	*70*	*117*	*50*
Austria	40	14	-	62	32	36	-	10	-	-
Sweden	406	270	104	213	143	372	323	60	117	50E
Others	*2139*	*1762*	*1804*	*1394*	*1131*	*1210*	*1124*	*1017*	*727*	*200*
Australia	2087	1760	1792	1394	1131	1210	1124	1016	727	200E
Japan	51	-	-	-	-	-	-	1E	-	-
South Africa	1	2	12	-	-	-	-	-	-	-
DEVELOPING COUNTRIES AND TERRITORIES	**6512**	**7145**	**6747**	**5394**	**6415**	**4248**	**4714**	**4045**	**4884**	**3245**
Africa	*304*	*343*	*237*	*159*	*71*	*39*	*125*	*173*	*230*	*220*
Rwanda	227	264	205	126	45	13E	100E	153	200E	200E
Uganda	18	20E	4	4	4	5E	-	-	10E	30E
Zaire	44	30	18	27	21	20E	20E	20E	20E	20E
Zimbabwe	15E	29E	10E	2E	1E	1E	5E	-	-	-
Latin America	*3561*	*3490*	*2528*	*2009*	*2043*	*1571*	*1541*	*1502*	*2487*	*1943*
Argentina	18	-	-	-	-	-	-	-	-	-
Bolivia	2050	2082	1304	1193	968	820	1102	958	1200E	1000E
Brazil	858	566	248	137	-	-	-	-	86	-
Guatemala	-	-	9	-	-	-	-	-	-	-
Mexico	100	124	149	104	235	186	175	172	201	143E
Peru	535	718	818	575	840E	565	264	372	1000E	800E
Asia	*2647*	*3312*	*3982*	*3226*	*4301*	*2638*	*3048*	*2370*	*2177*	*1052*
Hong Kong	-	-	953	1117	1903	1035	1868	1297	946	400E
Malaysia	31	25	20	2	20E	-	-	-	-	-
Myanmar	800	900E	950E	700E	500E	450E	450E	450E	400E	300E
Republic of Korea	625	477	440	302	273	118	-	-	-	-
Singapore	451	873	865	376	601	365	315	364	719	300E
Thailand	588	893	589	513	654	581	399	249	102	52E
Turkey	152	144	165	216	350	89	16	10	10E	-
SOCIALIST COUNTRIES OF ASIA	**13870**	**10712**	**11952**	**13165**	**12905**	**15354**	**17214**	**9772**	**4427**	**1560**
China	12870	9712	10952	12165	11905	14054	15914	8472	3127	760E
Mongolia	1000E	1000E	1000E	1000E	1000E	1000E	1000E	1000E	1000E	500E
Viet Nam	..	..	..	..	..	300E	300E	300E	300E	300E

Sources: UNCTAD, replies to questionnaires supplemented by published national statistics for: China, Hong Kong, Italy, Rwanda and Singapore.

Notes: Figures estimated by UNCTAD secretariat for: Canada, Democratic People's Republic of Korea, Malaysia, Mongolia, Myanmar, Uganda, Viet Nam, Zaire and Zimbabwe.

Table 6

STOCKS OF TUNGSTEN ORES AND CONCENTRATES
(Metric tons, tungsten content, end of year)

Region or country	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
PRODUCERS' STOCKS										
Australia	385	306	379	481	435	416	705	717	431	
Bolivia	..	..	..	..	..	105	130	210E	200E	
Brazil	17	17	17	875	..	70	84E	..	..	
France	159	76	85	205	65	-	-	-	-	
India	11	32	54	50E	50	57	10	11	13	
Japan	32	39	27	26	21	41	72	75	101	
Mexico	12	18	20	95	8	19	13	25	18	23E
Peru	..	..	46	241	..	71	54E	-	-	
Portugal	370	251	305	1042	941	970	1057	1180	634	600E
Republic of Korea	76	231	200E	44	45	45E	-	-	-	
Rwanda	40E	48	..	60E	10E	10E	10E	22	..	
Spain	75	114	84	50E	62	47	45	20E	..	
Sweden	..	..	..	..	..	..	206	-	-	
Thailand	834	804	1029	1025	1100E	1295	1487	1553	1617	1700E
Turkey	116	96	80E	145	43	..	..	..		
United States	54	46	60	21	21	21	10E	16	26	
Total	**2181**	**2078**	**2386**	**4360**	**2801**	**3167**	**3883**	**3829**	**3040**	**2323**
CONSUMERS' STOCKS										
Canada			-	-	255	75	70E	61	53R	
France	47	177	130	221	-	-	-	-	-	
Japan	511	557	671	687	448	455	561	860	661	
Portugal	5	3	10	1	..	1	1	1	1E	
Republic of Korea	..	..	..	..	..	..	..	..	200	
Sweden		256	302	333	353	301	218	40	40	41E
United States	1085	959	1077	502	329	499	1261	1077	1778	
Total	**1648**	**1952**	**2190**	**1744**	**1385**	**1331**	**2111**	**2039**	**2733**	**41**
DEALERS' STOCKS										
Argentina	11	9E	9E	..	..	..	..	..	..	
Japan	11	-	1	-	-	-	-	-	-	
Peru	-	-	-	-	-	7	7	27	27E	
Thailand	462	339	113	116	120E	51	107	83	26	30E
Total	**484**	**348**	**123**	**116**	**120**	**58**	**114**	**110**	**53**	**30**
GOUVERNMENTS' STOCKS										
United States	38904	37536	36842	36333	35625	35100	34634	34634	34634	
Total	**38904**	**37536**	**36842**	**36333**	**35625**	**35100**	**34634**	**34634**	**34634**	-

Sources: UNCTAD, replies to questionnaires.

Annex II

PROVISIONAL AGENDA FOR THE SECOND SESSION OF THE INTERGOVERNMENTAL GROUP OF EXPERTS

1. Election of officers

2. Adoption of the agenda

3. Work towards improving market transparency:

   (a) Examination of statistics and review of the current market situation and medium and long-term outlook

   (b) Consideration of industry views on particular aspects of the tungsten industry

4. Consideration of ways, means and measures to improve the functioning and stability of the tungsten market through strengthened international cooperation between Governments and industries of producing and consuming countries

5. Consideration of project proposals by Governments and industry which could be submitted for possible financing under the Second Account of the Common Fund for Commodities

6. Provisional agenda for the third session of the Intergovernmental Group of Experts

7. Other business

8. Adoption of the report of the Intergovernmental Group of Experts to the Standing Committee on Commodities.

Annex III

ATTENDANCE

1. The following States members of UNCTAD, members of the Intergovernmental Group of Experts on Tungsten, were represented at the session:

Austria	Peru
Belgium	Portugal
Bolivia	Republic of Korea
China	Russian Federation
France	Spain
Germany	Sweden
Italy	United Kingdom of Great Britain and Northern Ireland
Japan	
Mexico	United States of America
Netherlands	

2. The following other States members of UNCTAD, not members of the Intergovernmental Group of Experts, were represented as observers at the session:

Algeria	Ireland
Bulgaria	Madagascar
India	Norway

3. The following specialized agency was represented at the session:

International Monetary Fund

4. The following intergovernmental organization was represented at the session:

European Economic Community
Organization of African Unity

5. The following non-governmental organization was represented at the session:

Special Category

International Tungsten Industry Association